

NC eProcurement

Managing a Sourcing Event

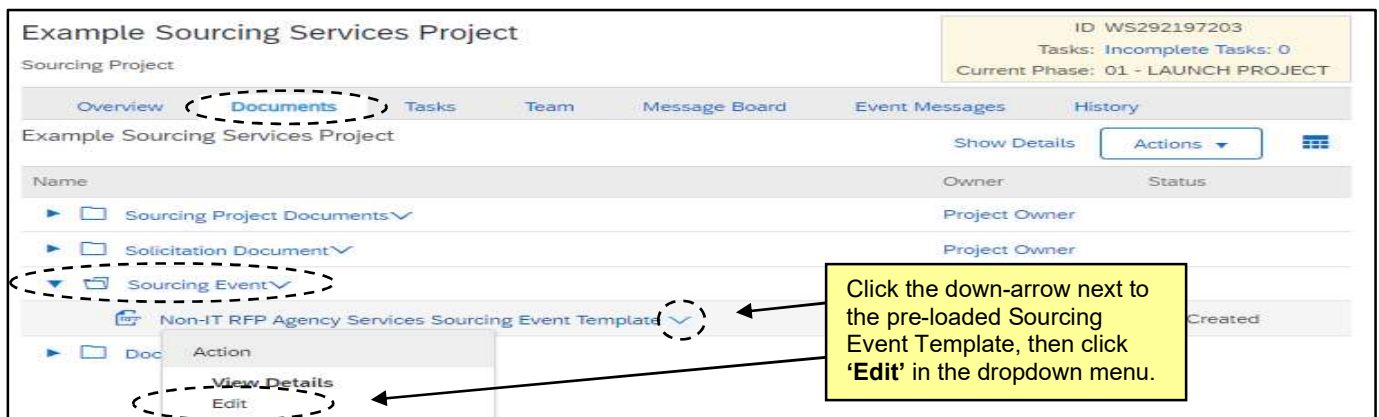
STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASING
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

A Sourcing Event is the most important part of a Sourcing Project. It is where the Sourcing Agent can establish the bidding dates and time, as well as compile all pertinent information to which the vendors will need to respond, as guided by a template established by the State. Notification of this Event can then be posted in IPS, and interested vendors can follow a URL to respond electronically in a consistent format. Finally, responses can be reviewed, and a contract can be awarded.

I. Create a Sourcing Event

1. Navigate to the **'Documents'** tab of the Sourcing Project and click the down-arrow to the right of the document within the **'Sourcing Event'** folder and click **'Edit'** from the drop-down menu.

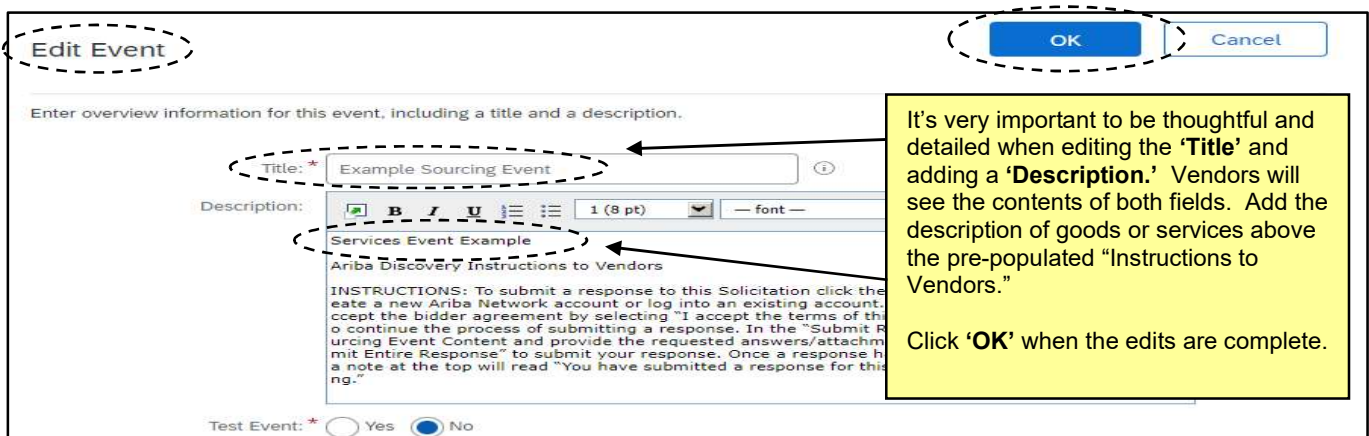
Note: This document template will depend upon selections made in the **'Solicitation Vehicle'** field along with the answer to the **'Select a template'** question on the **'Create Sourcing Project'** page.



2. The **'Edit Event'** page will display. It is important to populate the **'Title'** and **'Description'** with pertinent information, keeping in mind that both will be visible to vendors.

All other fields can be left as defaulted, and **'Currency,' 'Commodity,'** and **'Departments'** will be pre-populated based on selections made when creating the Sourcing Project. Then click **'OK.'**

Note: The **'Description'** field will pre-populate with "Instructions to Vendors." Leave those there and enter a description of the goods or services being solicited above.



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- The **'Event'** page will display and outline the four sections to be completed before publishing the Event: **'Rules,' 'Suppliers,' 'Content,'** and **'Summary.'**

Notes:

- Users will skip section 2 for **'Suppliers'** until after sections 1 and 3 have been completed and the Sourcing Event has been approved (if necessary). The **'Tasks'** tab outlines this process and more information is provided in this document below.
- The Event will be assigned a **'Doc Number'** by the system immediately preceding the Event **'Title'** entered on the previous page. This **'Doc Number'** will be used as part of the IPS **'Solicitation Number'** following the user's entity numerical/character prefix (i.e., **13-82296023** or **DPC-82296023** for Division of Purchase and Contract – This prefix should auto-populate in IPS).

Event Doc176650585 - Example Sourcing Event

Next Exit

These rules control every aspect of how the event works. You may change them to suit your event or accept the defaults.

Envelope Rules

Number of Envelopes: 1

Authorize Teams to Open Envelopes

| Envelope Id | Team |
|-------------|---------------|
| 1 | Project Owner |

A system-generated 'Doc Number' displays before the 'Title' entered on the previous page and the four stages in the process to finalize the Event display on the left side.

II. Setting Event 'Rules'

The first of the four sections to edit and set are the Event **'Rules.'** Most importantly, the rules section allows the Sourcing Agent to establish the **'Timing Rules'** outlining when the bidding starts and stops. Many of the fields within the six sub-sections on this page are pre-populated, and it is advised that users leave them as is.

- 'Envelope Rules'** is the first subsection. The system will default the event to having one envelope and lists the **'Project Owner'** as the user group with the ability to open the envelope. Envelopes are designed to conceal response information until after the **'Due Date.'** It is advised that the user leaves the default as is, but if they would like a multiple-envelope Event revealing different aspects of the response in layers, they can manually increase the number of envelopes up from one using the dropdown menu.

Envelope Rules

Number of Envelopes: 1

Authorize Teams to Open Envelopes

| Envelope Id | Team |
|-------------|---------------|
| 1 | Project Owner |

The number of envelopes defaults to one, and the 'Project Owner' is designated as the user with authorization to open it. It is suggested that the user accept the default value.

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2. **'Timing Rules'** is the next and most important section. There are two required fields that set when vendors can begin to respond with bids and when their bids are last due.
 - a. **'Response start date'** defaults to **'When I click the Publish button on the Summary page,'** meaning that vendors can begin responding immediately once the Event is finalized by clicking **'Publish.'** If the user would prefer to set a specific date in the future for when vendors can begin to respond, click **'Schedule For the Future'** and set a specific date and time from the pickers.
 - b. **'Due date'** sets the time when the bidding period is closed. It defaults to a **'Duration'** of 3 days, but it should be switched to a **'Fixed time'** where the user can set a specific closing date and time from the pickers.

Timing Rules

Response start date: * ☒ When I Click the Publish button on the Summary page
☐ Schedule For the Future:

Due date: * ☐ Duration: End time explicitly specified
☒ Fixed time: 10/1/2021 2:00 PM

Change the 'Due date' to 'Fixed time' and select the date and time to match the bidding end time established in the Solicitation Document.

3. It is suggested that users leave all defaulted values as is for sections three through six. These four sections are **'Bidding Rules,' 'Project Owner Actions,' 'Market Feedback,'** and **'Message Board.'** When all Event **'Rules'** have been set, click onto Section 3 for **'Content.'**

III. Updating the Sourcing Event Content

The **'Content'** section of the Event is where the user can share all information about the products or services they wish to receive bids on, and it serves as the framework for vendors to provide a response. The State has created an extensive template in this section that complements the default **'Solicitation Document'** generated on the Sourcing Project, and it is advised that users follow the suggested outline.

1. The **'Content'** stage is divided into six numerical sections, most of which have subsections:
 - 1) **Welcome to the State of North Carolina's Sourcing Tool:** A brief welcome message for vendors.
 - 2) **Instructions on How to Use the Sourcing Tool:** Instructions and tips for vendors on how to provide a response within the tool.
 - 3) **Solicitation Document and Details:** Users will upload their completed **'Solicitation Document'** in subsection 3.1. Vendors will find instructions for submitting questions in subsection 3.2, and pre-loaded, informational attachments in subsections 3.3 and 3.4. If an **'Addendum'** is required, users will post it here and it will become subsection 3.5.
 - 4) **Vendor Information:** This section requires vendors provide their **'Customer Number'** from their NC eVP account.
 - 5) **Pricing Submittal:** By default, the user will upload a customized pricing response template that vendors will download, complete with the prices they are bidding on the requested products or services, and re-upload to the Event as an attachment. **'Line Item'** pricing can replace the default attachment response if desired.

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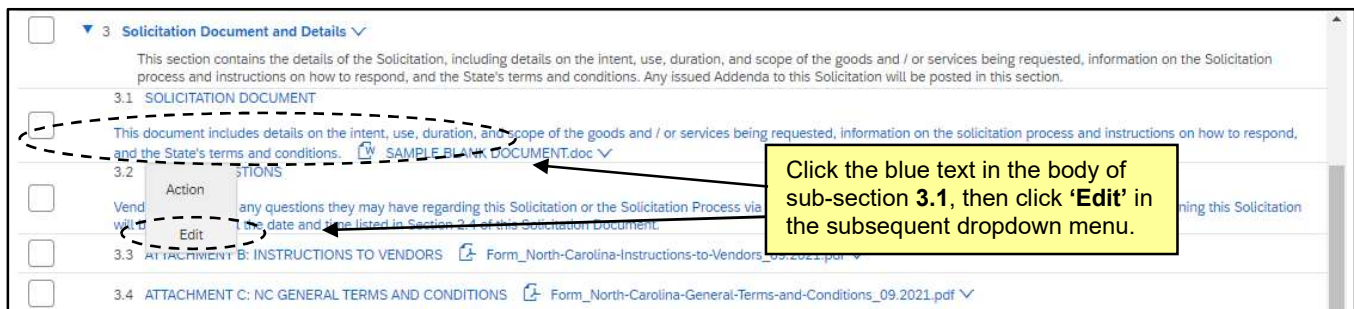
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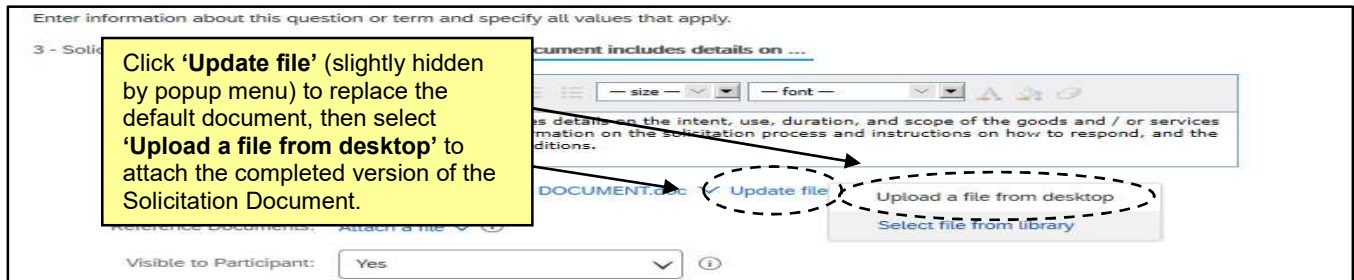
- 6) **Vendor Response:** This section contains several subsections instructing the vendor to return completed documents to accompany their pricing submittal. No action is necessary by users in this section as all of the documents have been provided for the vendors, and most of the response fields are required by default to be completed by the vendor.

Note: In subsection **6.1** vendors will return a completed version of the **'Solicitation Document'** they downloaded in subsection **3.1**. The returned version of this document will include an **'Execution'** section to capture the vendor's signature. This section can be countersigned by the agency and is intended to be used as Contract Documentation for the winning bid at the conclusion of the Solicitation process.

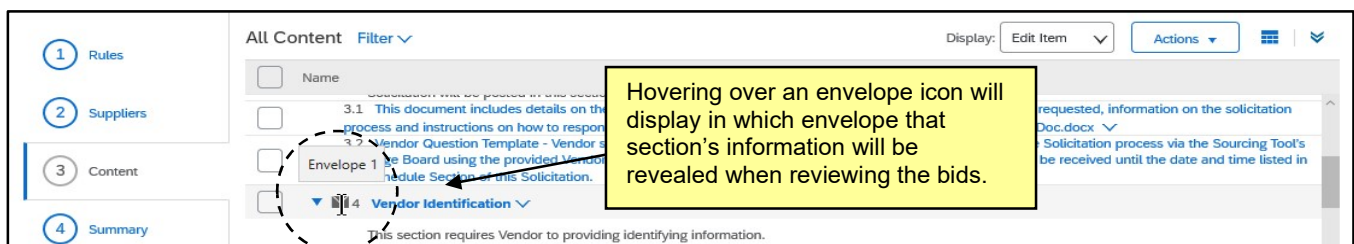
2. **Section 3, 'Solicitation Document and Details,'** is the first section a user needs to update. A **'SAMPLE BLANK DOCUMENT.doc'** is attached to **3.1** by default. To replace this document, click on the blue text in the body of **3.1** and select **'Edit'** from the subsequent dropdown menu.



3. The **'Edit Attachment'** page displays. Click **'Update file'** next to the **'SAMPLE BLANK DOCUMENT.doc'** file, then attach the finalized Solicitation Document by selecting **'Upload a file from desktop'** and click **'OK'** after selecting the file, then click **'Done'** on the subsequent screen.



4. There is no action necessary in **Section 4, 'Vendor Identification.'** Note the envelope icon next to the number and hover the cursor over it to display in which envelope that section's answers will be revealed if the default is changed to more than one. To set the Envelope in which a section's answers will be concealed, check the box to the left of the section, click **'Edit,'** and select **'Content'** from the dropdown, then set the number from the **'Envelope'** field dropdown.



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- In **Section 5, 'Pricing Submittal,'** vendors will attach their pricing responses to the products or services being bid upon. The user must provide a template for vendors to populate. In **5.1**, duplicate the steps performed in **3.1** (Step 2) by clicking on the blue text in the body of the subsection and selecting **'Edit'** from the dropdown menu.
- Navigate to the **'Reference Documents'** field and click the **'Attach a file'** link. Add the Pricing Submittal template the vendor needs to fill out and click **'Done.'** Vendors are instructed to download this template to fill out with their pricing and re-upload it for the user to review.

Note: Microsoft Excel is the default format for this attachment. If the user prefers to attach this document in another format, remember to update the wording in the **'Name'** field when adding the attachment.

Enter information about this question or term and specify all values that apply.

5 - Pricing Submittal / 5.1 - ATTACHMENT A: PRICING SUBMITTAL ...

Name: *

ATTACHMENT A: PRICING SUBMITTAL

Vendor shall download, complete, and upload a Microsoft Excel file that is available by clicking on References at the end of this item.

Is this a prerequisite question to continue with the event? No

Answer Type: Attachment

Response Required? Yes, Participant Required

Reference Documents: Attach a file

Visible to Participant: Yes

Upload a file from desktop

Select file from library

- Users have the ability to add **'Line Items'** directly into the **'Content'** of the Event if they'd prefer vendors provide their pricing response directly into the tool as opposed to attaching it in a document. The benefits of this will be realized when the user compiles response information for the bid tabulation. For further guidance on this process, please see the **'Adding Special Content to a Sourcing Event'** job aid.
- Section 6, 'Vendor Response,'** is populated with eight subsections for **'Service'** solicitations and twelve for **'Goods'** solicitations. These templates auto-populate based on what the user selected in the **'Approval Scenario'** field when creating their Sourcing Project. All attachment subsections besides **'Attachment H: EO 50 Price Matching Opportunity'** (**'Goods'** solicitations only), the **'Certification For Federal Contracts, Grants, Loans, And Cooperative Agreements'** subsection, and the **'Alternate Response'** subsection are required for vendors to complete by default. There is no action necessary for users in this section.
- If any changes to the default content are necessary, subsections can be added, edited, or deleted, although users should be very careful when doing this. To delete a subsection, check the box to its left and click the **'Delete'** button at the bottom of the **'Content'** section. That subsection will be removed (it cannot be undeleted), and the subsection numbering below it will automatically adjust.

6.4 ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

Vendor shall download, complete, and upload the completed template by clicking on References at the end of this item.

Answer Attach a file

6.5 ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION

As a condition of contract award, the Vendor must demonstrate that it has the financial capacity to perform the contract by providing the required supporting documents, as applicable.

Answer Attach a file

Add Edit Delete Excel Import Simplified Excel Import Smart import from Excel (*) indicates a required field

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- To edit a subsection, check the box to its left and click the **'Edit'** button at the bottom of the **'Content'** section. From the subsequent dropdown menu, click **'Content.'**
- The **'Edit Question'** page will display, although it is advised that no edits be made to default subsections. One potential field to change is the **'Response Required?'** field. This field defaults to **'Yes, Participant Required,'** but if the user would like to keep the attachment in the content but not make it a mandatory for the vendor to return, they can select **'Not Required'** from the dropdown menu and click **'Done.'**

IV. Approving the Event

Approving a Sourcing Event may not be necessary in all cases. If the user does not need their Event approved, they should skip this portion of the document and move to the next, which covers the **'Suppliers'** section. If the user does need the Event approved, either internally or by P&C, they should follow the steps below and proceed to the **'Suppliers'** section once approval has been granted.

- When the user completes the **'Content'** section and proceeds to the **'Summary'** section, they will see that the **'Publish'** button is greyed out and unable to be clicked. A message alerting the user that they must "create a Supplier Discovery Posting" before publishing will display at the top. This "Supplier Discovery Posting" can be created by returning to Section 2, **'Suppliers.'** If the user needs the Event approved, however, they will stop here.

- At this point the user should click the **'Exit'** button in the top right to save the Event. The **'Confirm Edit Event Exit'** screen will display providing the user with various options. Clicking **'return to project'** will save the Event as is and take the user to the originating Sourcing Project where they can begin the process to have the Event approved. The bottom option to **'Create saved version'** will save the progress made as a separate version, and the screen will include instructions on how to undo any subsequent changes. The bottom option works if desired but is not advised.

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Confirm Edit Event Exit

What would you like to do next?

- Continue working on this event.
- View details or return to project.
- Create saved version and exit.

Your edits have automatically been saved as you work. Others cannot edit the event unless you have created a saved version.

Prior to publishing, you are allowed to create saved versions or 'checkpoints' of your work on an event. Once you have a saved version, you can undo any subsequent changes by selecting **Actions > Revert to Saved Version** while viewing the event.

NOTE: You can only revert to the last saved version that was created.

Clicking 'return to project' will save the Event as is and take the user back to the originating Sourcing Project. The bottom option will save the progress made as a separate version and is not advised.

- Navigate to the **'Tasks'** tab on the Sourcing Project and go to the **'Gain Approval of Sourcing Event'** task in **'Phase 04.'** Click on the task and select **'View Task Details'** from the dropdown.
- On the subsequent **'Approval Task'** page, select a user or group to review and approve the Event from the dropdown under **'Select Approvers'** (if this field does not display by default, click on the **'Custom'** link and then click **'Add Initial Approver'** on the subsequent screen). Click **'Search more'** to find profiles that don't immediately display. Who is chosen to approve should be guided by entity protocols. Multiple approvers can be selected by clicking **'Add more'** after the first approver is selected. It is advised that the user also select a **'Due Date'** because this will trigger a notification for the approver(s) in their **'To Do'** portlet. When all approvers have been added, click the **'Submit'** button at the bottom of the screen to send the approval request to the first approver.

2. Select Approvers

Approval Rule Flow Type:

(no value)

Project Owner

SourcingTrainer01

3. Specify Due Date

Days after parent phase starts: None

☒ Fixed Date: 01/15/2021

4. Provide an initial message and click Submit

From the **'Select Approvers'** dropdown, choose any approvers that need to review the Event and add a **'Due Date,'** then click the **'Submit'** button.

- On the **'Tasks'** tab, the task status will display as **'In Approval'** until it is completely approved, when it will automatically shift to **'Approved.'** At this point the user should note the next task, **'Create Supplier Research Posting and Publish Sourcing Event,'** that can be completed back on the Sourcing Event. Navigate to the **'Documents'** tab, click on the Event, and select **'Edit'** to access and complete the Event.

| | | |
|---|-------------------|---------------------|
| 03 - DEVELOP SOURCING STRATEGY | Project Owner | Not Started |
| 04 - DEVELOP SOURCING EVENT | Project Owner | Complete 01/15/2021 |
| Populate Solicitation Documents | Project Owner | Not Started |
| Build Sourcing Event | Project Owner | Not Started |
| Gain Approval of Sourcing Event | SourcingTrainer01 | Approved 01/15/2021 |
| Create Supplier Research Posting and Publish Sourcing Event | Project Owner | Not Started |
| 05 - CONDUCT SOURCING EVENT | Project Owner | Not Started |
| 06 - NEGOTIATE AND AWARD | Project Owner | Not Started |

When the final approver approves the Sourcing Event, a checkmark will display next to the task, and the status will automatically flip to **'Approved.'** The user will then transition to the next task by going back to the Sourcing Event.

V. Creating a Supplier Research Posting in the 'Suppliers' Section

After the Sourcing Event has been approved, the user will access the Event and choose to **'Edit'** it. At this point they will be ready to go back to the section they previously skipped, section 2, the **'Suppliers'** section. In this section, the user will **'Create a Supplier Research Posting.'** When all required information has been added to this section, the user will click the yellow **'Publish on Ariba Discovery'** button at the bottom of the page. Once the Sourcing Event is later published, a URL will be available, and the user can copy and paste that URL in the **'NCEP URL'** field within the IPS posting. Vendors wishing to respond to the solicitation will then follow that URL and respond with this Sourcing Event.

Additionally, this information, when published on **'Ariba Discovery,'** will reach an audience of prospective bidders who may not currently be registered in IPS, thus expanding the pool of potential bidders.

1. Navigate to section 2 **'Suppliers.'** The **'Create a Supplier Research Posting'** page will display.
2. Populate all relevant fields, including the six required fields, as noted by an asterisk (*). Some fields will be pre-populated based on information the user has already entered in the Sourcing Event, and other information will need to be added by at this point.
3. **Posting Title*:** The first field in the blue section of the screen will be pre-populated based on the information entered in the **'Title'** field when first creating the Sourcing Event. Remember, this title will be public-facing.
4. **Product and Service Categories*:** This field is not pre-populated. It corresponds with the **'Commodity'** field describing the nature of the solicitation in both the Sourcing Project and in the IPS posting. This selection will be used to alert **'Ariba Discovery'** vendors of the bidding opportunity. To select a category, begin typing into the text box. The system will auto-fill with suggestions in the dropdown. Click on the option that best fits the solicitation.

The screenshot shows the 'Create a Supplier Research Posting' form. The 'Posting Title' field is pre-populated with 'Example Sourcing Event'. The 'Product and Service Categories' field is active, showing a dropdown menu with suggestions: 'Health', 'Health administration services', 'Health or hospitalization insurance', 'Traditional healthcare services', 'Public health administration', 'Health systems evaluation services', 'Health legislation or regulations', 'Health policy', 'Health economics', 'Health service planning', and 'Health sector manpower development'. A yellow box highlights the 'Traditional healthcare services' option, and an arrow points to it with the text: 'Start typing in the text box and select the best auto-fill option from the dropdown.' The 'Add' and 'Browse' buttons are visible to the right of the dropdown.

5. The selection will appear in a blue box below the field box.

The screenshot shows the 'Create a Supplier Research Posting' form after the selection. The 'Product and Service Categories' field now displays 'Traditional healthcare services' in a blue box with a close button (X). The 'Add' and 'Browse' buttons are visible to the right of the field. The 'Ship-to or Service Locations' field is also visible below it.

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6. **Ship-to of Service Locations*:** Type "North Carolina" in the text box, and from the dropdown choose the area that best matches the location of the user. This selection will be used to alert **'Ariba Discovery'** vendors of the bidding opportunity. The selection will appear in a blue box below the field box.

Product and Service Categories: * Enter Product and Service Categories Add -or- Browse

Traditional healthcare services X

Ship-to of Service Locations: * North Carolina

Opportunity Amount: * North Carolina - United States

Contract Length: Goldsboro - North Carolina

Response Deadline: * Raleigh-Cary - North Carolina

Award Date: Winston-Salem - North Carolina

Description: * Asheville - North Carolina

Fayetteville - North Carolina

Wilmington - North Carolina

Greenville - North Carolina

Jacksonville - North Carolina

Rocky Mount - North Carolina

Typing "North Carolina" in the text box will display more specific regional options in the dropdown that can be selected.

7. **Opportunity Amount*:** Select a dollar amount range from the dropdown for what is the estimated value of the solicitation. Zero dollars is recommended.
8. **Contract Length:** Enter the length of the contract in months. This field is not required.
9. **Response Deadline*:** This will pre-populate with the **'Due Date'** and time set in the **'Rules'** section.
10. **Award Date:** If the user knows the date on which they intend to award the solicitation, they can enter it here, but this field is not required.
11. **Description*:** This field will be pre-populated based on the information entered in the **'Description'** field when first creating the Sourcing Event.

Note: The listed end time for bidding **'Due Dates'** in **'Ariba Discovery'** from the vendor's perspective is sometimes displayed in a different time zone, and this cannot be edited. It is recommended that users add a note in the **'Description'** field reiterating the actual Eastern Time Zone end time that's already been established in the Sourcing Event. This should be inserted in between the solicitation description and the "Instructions to Vendors" and be highlighted and bolded for greater visibility.

Response Deadline: * 15 Dec 2021 02:00 PM EST

Award Date: 11:59 PM EST

Description: * Services Event Example

Note: The actual end time for bidding will be 2:00 PM EST on Dec 15, 2021

Ariba Discovery Instructions to Vendors

INSTRUCTIONS: To submit a response to this Solicitation click the "Respond to Posting" button. Create a new Ariba Network account or log into an existing account. Click "Review Prerequisites" to accept the bidder agreement by selecting "I accept the terms of this agreement." Then select "OK" to continue the process of submitting a response. In the "Submit Response" section, review the Sourcing Event Conte

Add a note in between the existing text regarding the actual end time for the 'Due Date.'

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12. **Attachments:** There is no need to add any attachments to this page.
13. **Preference for Seller:** This field is unchecked by default and it is advised the user leaves it as such.
14. **Bid Requirement:** This field is unchecked by default and it is advised the user leaves it as such.
15. **Privacy Settings:** This field is unchecked by default and it is advised the user leaves it as such.
16. When all fields have been populated, the user should click the '**Publish on Ariba Discovery**' button at the bottom of the screen.

Create a Supplier Research Posting

Adding additional suppliers to your sourcing project helps to drive down costs and reduce risks. Use this form to create a posting on Ariba Discovery and suppliers will be automatically matched to your needs. [View Testimonials](#).

Create a successful posting by following our best practices. [See Posting Tips »](#)

Posting Title: *

Product and Service Categories: *

-or-

Traditional healthcare services X

Ship-to or Service Locations: *

-or-

Raleigh-Cary - North Caro... X

☐ Prefer Sellers with a physical presence in the selected location.

Opportunity Amount: *

-or-

Contract Length:

 Months

Response Deadline: *

Award Date:

Description: *

Services Event Example
Note: The actual end time for bidding will be 2:00 PM EST on Dec 15, 2021
 Ariba Discovery Instructions to Vendors
 INSTRUCTIONS: To submit a response to this Solicitation click the "Respond to Posting" button. Create a new Ariba Network account or log into an existing account. Click "Review Prerequisites" to accept the bidder agreement by selecting "I accept the terms of this agreement." Then select "OK" to continue the process of submitting a response. In the "Submit Response" section, review the Sourcing Event Content and provide the requested response/attachments. Once completed, click "Submit"

Attachments:

Preference for Seller:

☐ Add preferences for this posting ⓘ

Bid Requirement:

☐ Require a bid from sellers that respond.
Note: Bid amounts are not required for all posting types.

Privacy Settings:

☐ Hide my company name
 ☐ Hide my contact name

*Indicates a required field

VI. Summary Section and Publishing the Event

When section 2 is completed, the user can return to the fourth and final **'Summary'** section. This contains the summary of the first three sections and allows the user to review and edit before clicking **'Publish'** to finalize the Event.

1. The **'Overview'** information is at the top of the page, above the **'Rules,' 'Suppliers,'** and **'Content'** information in descending order. To edit any of the **'Overview,'** click the **'Actions'** button and select **'Edit Overview'** from the dropdown menu. If any other sections need to be edited, click on that section on the left side of the screen.
2. For a summary of the entire contents of the Event in the form of a MS Word document (which may be helpful to refer to when posting Event information to IPS), click the **'Actions'** button and select **'Print Event Information,'** and the system will generate an up-to-date, time-stamped document.

Event Doc291697141 - Example Sourcing Event

Review and revise your event. Your edits have been already saved. When you finish, you can launch the event or leave it as a draft [More](#)

Overview

To edit any information in the **'Overview'** section, click the **'Actions'** button and then click **'Edit Overview.'**

To edit any information from any other section, click the link to that section on the left side.

Owner: SourcingTrainer10 ⓘ

Editors:

Event Type: RFP

Test Event: No

Commodity:

Last Modified:

Regions: (no value)

Departments: ADMNP DOA Purchasing

Currency: US Dollar

Actions

Edit Overview

Print Event Information

Click **'Print Event Information'** for a MS Word version of the contents of the Event.

3. The user can now click the **'Publish'** button to finalize the Event.

Doc291697141 - Example Sourcing Event

Review and revise your event. Your edits have been already saved. When you finish, you can launch the event or leave it as a draft [More](#)

Overview

Click **'Publish'** to finalize the Event.

Prev Publish Exit

Actions

4. The **'Event Published'** page displays, and the user will have the option go back to the Event by clicking **'Monitor'** or return to the overall Project. It is advised to select **'Monitor'** to verify the countdown clock for the Event **'Due date'** is accurate.

Event Published

You have published your event. You can monitor the event activities or work on other tasks.

What would you like to do next?

Click **'Monitor'** to return to the Event.

Monitor this event.

Return to project.

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BIDDING
BUY

- Upon returning to the Event, the user will find seven tabs at the top of the screen. The **'Overview'** tab is where the **'Rules'** are summarized along with a **'Version History'** section towards the bottom of the page. Other tabs are **'Content,' 'Suppliers,' 'Discovery Suppliers,' 'Messages,' 'Log,'** and **'Award,'** although the **'Award'** tab can be ignored. Clicking the **'Actions'** button will display several options including **'Edit'** to make any necessary changes, and **'View Project'** to navigate directly back to the Sourcing Project within which this Event exists.
- Based on the timing rules established, it may immediately be **'Open'** to receive bids, as is the case below. A clock will appear in the upper right counting down how much time is left until the bidding period ends.

VII. Managing a Published Event and Responding to Vendor Questions

Once the Event has been published, **Phase 4** of the Sourcing Project will be complete, and the user should move on to **Phase 5**. The first task in **Phase 5** is to **'Post Sourcing Event Summary and Link to Sourcing Event on IPS.'** Posting the link within IPS will give vendors interested in responding the ability to access the Event via their Ariba Network accounts and a path to an electronic response. During the Event, if responders have any questions, they will submit them via the Event message board, and if necessary, the user can address those questions by posting an **'Addendum'** in the Event before responders submit their final bids.

- If the user is not already in the Event, go to the **'Documents'** tab on the Sourcing Project, click on the Event document and select **'Monitor'** from the dropdown menu.

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- Click on the **'Discovery Suppliers'** tab and copy the URL in the **'Public Posting'** field. Go to IPS and populate the Solicitation Posting as instructed by P&C.

Notes:

- The copied URL should be pasted in the **'NCEP URL'** field.
- The **'Solicitation Number'** field will be the system-generated **'Doc Number'** (found at the top of the Sourcing Event) pasted after the user's auto-populated entity numerical/character prefix.

- If a vendor has any questions during the Q&A period, they are instructed to submit them via the Event Messages page. A notification will appear on the user's home page when a message is received, or a user can check the **'Messages'** tab on the Event at any time to see these messages. Click on the **'Subject'** of the new message to read it.

- The **'View Message'** page will display, and the user can see the vendor's questions.

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- If the user would like to generate an export of only the vendor questions within the Event **'Messages'** tab, they can click the **'Table Options Menu'** icon (stacked boxes) below the **'Actions'** button, then select **'Messages From Participants'** and **'Show Details'** from the dropdown. Finally, they can select **'Export all Rows,'** and an Excel download of all vendor questions will be created.

Messages

| Id | Reply Sent | Sent Date | From | Contact Name | To | Labels | Subject |
|-------------|------------|---------------------|---------------------|----------------|---------------------------|------------|--------------------------|
| MSG25803241 | No | 10/13/2021 11:25 AM | NC Test Vendor | State Supplier | Participants (0) Team (3) | (no value) | IFB # 292197227 - Questi |
| MSG25803238 | No | 10/13/2021 11:21 AM | Mari Test Account 1 | Mari 1 | Participants (0) Team (3) | (no value) | IFB # 292197227 - Questi |

To generate an export of only vendor questions, click the 'Table Options Menu' (stacked boxes) and select 'Messages From Participants' and 'Show Details' before selecting 'Export all Rows' from the dropdown menu.

Note the contents of the messages now appear, not just the 'Subject.'

Export all Rows
Export Current Page
Show/Hide Rows
Show Details

- When the Q&A period is over and all vendor questions have been reviewed, the user may need to create an **'Addendum'** to address the questions. From the **'Documents'** tab on the Project, expand the **'Sourcing Project Documents'** folder, then click on the **'Addendum Document Template'** link and select **'Download.'** Fill the document out, rename it, and save it back into the Project.

Documents

Example Sourcing Services Project

Sourcing Project Documents

Addendum Document Template

Download

Expand the 'Sourcing Project Documents' folder, then click on the 'Addendum Document Template' link and select 'Download.'

- 'Monitor'** the Event again from the Project's **'Documents'** tab, and then navigate to the Event **'Content'** tab. Click the **'Actions'** button in the top right and select **'Edit'** from the dropdown menu.

Doc292197227 - Example Sourcing Event

Content

Actions

Edit

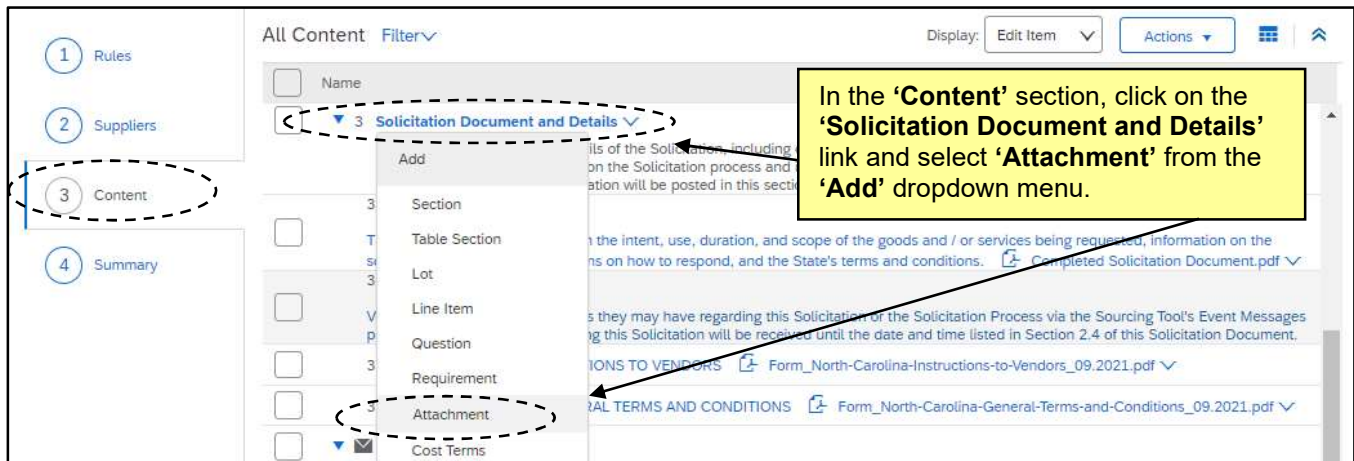
Click the 'Actions' button (obscured by the dropdown menu) in the top right of the 'Content' tab, and then click 'Edit.'

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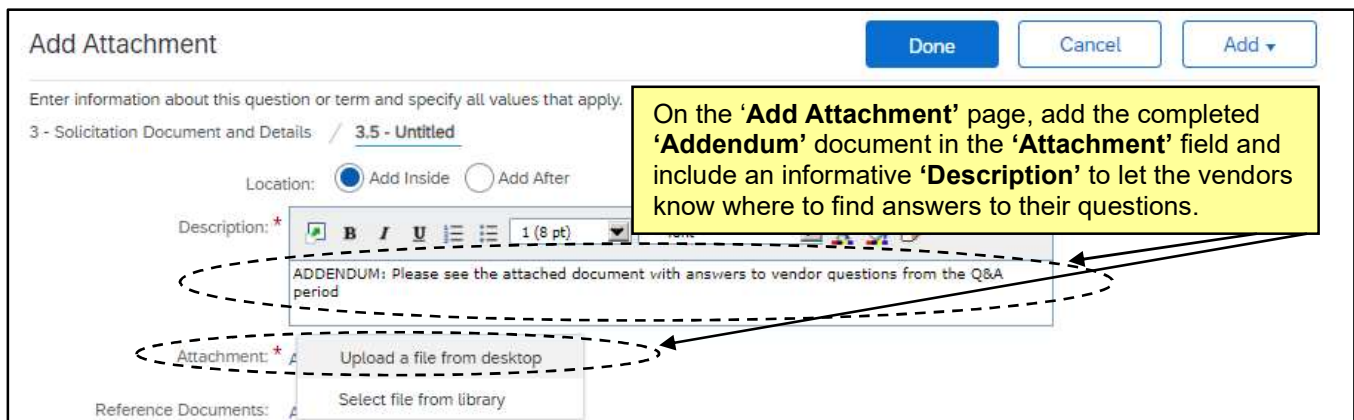
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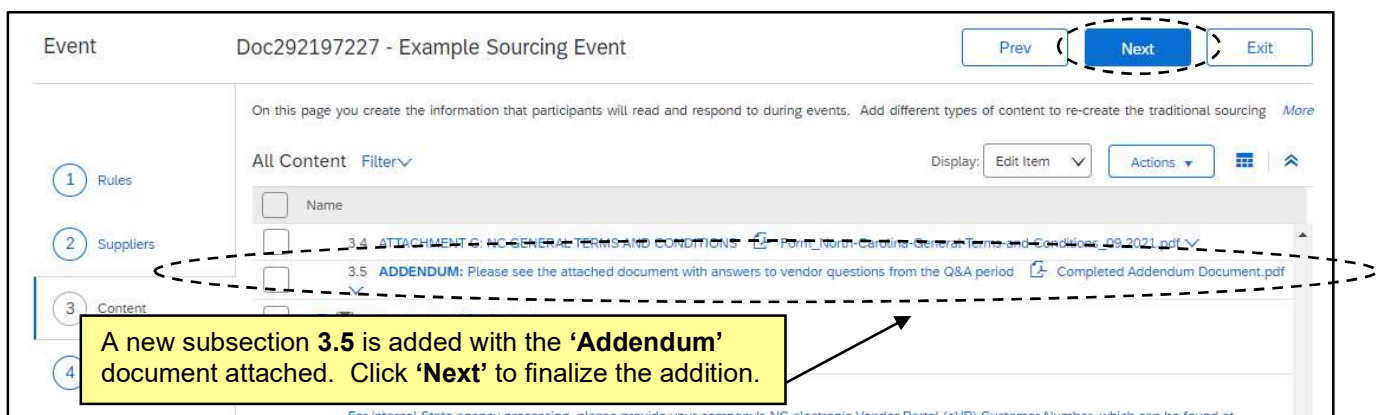
- Click the **'Content'** link on the left side of the screen, click on the **'Solicitation Document and Details'** link next to **3**, and select **'Attachment'** from the **'Add'** dropdown menu.



- The **'Add Attachment'** page will display, and the attachment will automatically be assigned to subsection **3.5**. Attach the completed **'Addendum'** document in the **'Attachment'** field. Add a **'Description'** to let the vendors know this is where they can find the answers to their questions and click **'Done.'**



- The newly added subsection **3.5** will now display with the **'Addendum'** document attached for the vendors to review. Click **'Next.'**



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11. The **'Pending Changes'** will display in the **'Summary'** section where the user can review the change before finalizing it by clicking **'Update'** in the top right.

Event Doc292197227 - Example Sourcing Event

Prev Update Exit

Review and revise your event. Your edits have been already saved. When you finish, you can launch the event or leave it as a draft for future edits.

Content Changes 1 Change pending

| Published Version | Draft Version | Diff Type | Responses | Removed | Details |
|-------------------|--|-----------|-----------|---------|---------|
| 3.5 | ADDENDUM: Please see the attached document with answers to vendor questions from the Q&A period. Completed Addendum Document.pdf | Added | No | | |

Participant Changes

Contact Name Item Name

Review the 'Pending Changes' and if correct, click 'Update.'

12. A final review page will display giving the user four options for handling any responses that may have already been submitted by vendors. **'Keep and email,' 'Keep, but do not email,' 'Do not keep, and email,'** and **'Do not keep, and do not email.'** Select the option that makes the most sense given the situation per guidance from P&C and add a brief message in the box to let the vendors know that an **'Addendum'** has been added. Click **'Update Event'** to officially attach the **'Addendum,'** and the user will be given the option to return to the Event or go the Project.

Event Doc82296023 - Example Sourcing Event

Cancel

Depending on the changes that you made, responses that participants have already submitted may no longer be valid. For [More](#)

Choose an option for participants' responses:

☒ **Keep and email** - Keep participants' existing responses and send an email to participants, notifying them that they should review their previously submitted responses to ensure that they are still accurate.

Include an additional message in the notification (optional)

Please see the Addendum added to section 3 of the Event to address previous questions. Thank you.

Max. 2000 characters

☐ **Keep, but do not email** - Keep existing responses, but do not send a notification email to participants.

☐ **Do not keep, and email** - Discard existing responses, and email participants to let them know.

☐ **Do not keep, and do not email** - Discard existing responses, and do not email participants.

Certain users receive notification emails regardless of the option selected.

- Any Participants added or removed during the update.

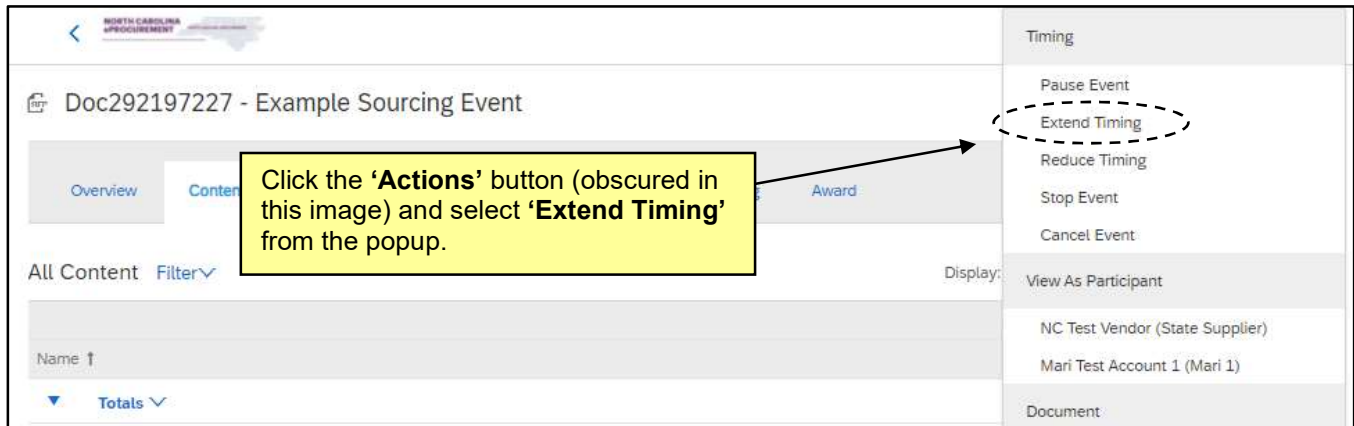
Update Event

Choose the best of the four options for handling any responses that have already been submitted, add a message to let the participants know an 'Addendum' was added, and click 'Update Event.'

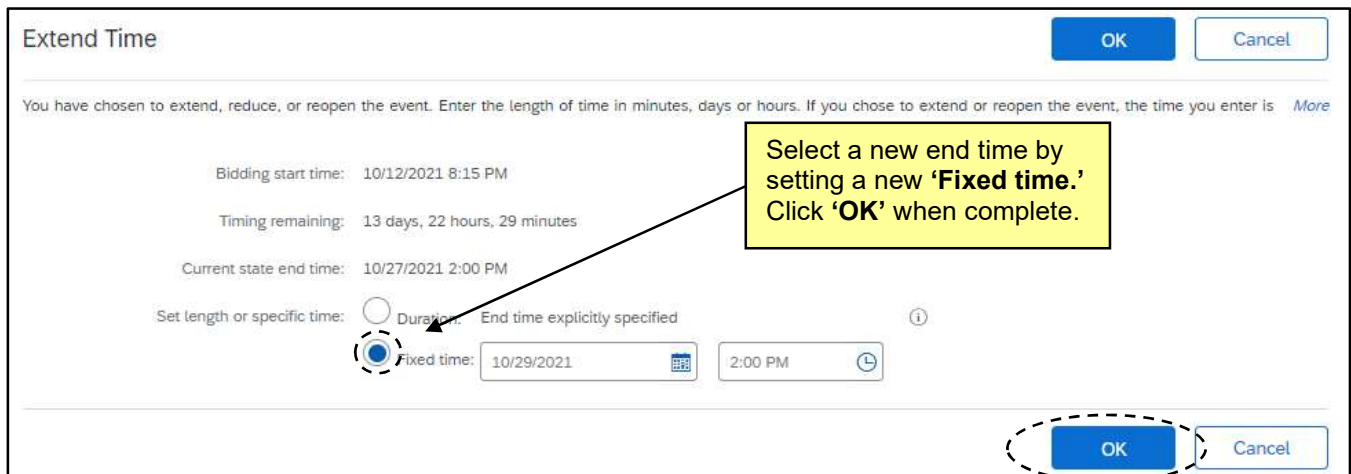
VIII. Editing the Timing on a Published Event

Sourcing Agents have the ability to change the timing on a published Event if necessary. Although it is not advised to reduce the amount of time vendors have to respond, there might be some scenarios where the timing needs to be extended, and there are two steps required, including updating the **'Discovery Suppliers'** tab, before posting notice in IPS per P&C guidelines.

1. From the Event, click on the **'Actions'** button in the top right. A popup menu will display and the **'Timing'** options will be at the top. Click on **'Extend Timing.'**



2. On the subsequent **'Extend Time'** page, note the current start and end times, and then set a new, later end time. The new end time can be extended by switching the radio button to **'Fixed time'** and choosing the new date and time via the pickers, then clicking **'OK.'**



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- The new end time will now be reflected in the countdown clock in the top right. The user should then navigate to the **'Discovery Suppliers'** tab and click **'Manage Posting.'**

Overview Content Suppliers **Discovery Suppliers** Messages Log Award Actions

TEST DISCOVERY POSTING - DO NOT RESPOND Open - Matching in Progress

State of North Carolina

Posted On: 7 Apr 2021
Open for bidding on: 7 Apr 2021
Response Deadline: 8 Apr 2021 9:59 PM PDT

Views: 0 Seller Responses: 0 Q&A: 0

Hide Details | Manage Posting | Share: [Facebook] [Twitter] [LinkedIn] [Email]

Opportunity Amount: \$0.00 USD (Bid amount not required)
Response Deadline: 8 Apr 2021 9:59 PM PDT
Posting ID: 10120379(Doc190812523)
Suppliers Invited: 0
Posting Type: Request for Information
Privacy: Participating supplier list hidden
Company name hidden. Company alias (Ariba Discovery Buyer) will be displayed.
Contact name hidden
Public Posting: <http://discovery.ariba.com/rfx/10120379>

Leave feedback

- In the **'Response Deadline'** field, set the new **'Due Date'** to match the date updated during the **'Extend Time'** step. Be sure to also update any text referring to the **'Due Date'** in the **'Description'** field.

Contract Length: [] Months

Response Deadline: * 22 Dec 2021 02:00 PM EST

Award Date: []

Description: * [B I U] Services Event Example

Note: The actual end time for bidding is 2:00 PM EST on Dec 22, 2021

Ariba Discovery Instructions to Vendors

INSTRUCTIONS: To submit a response to this Solicitation click the "Respond to Posting" button. Create a new Ariba Network account or log into an existing account. Click "Newly Registered" to accept the bid document by selecting "I accept"

- When all edits have been completed, click the **'Update on Ariba Discovery'** button in the bottom right to finalize the changes so that the **'NCEP URL'** link posted in IPS stays active for the duration of the extended event.

Notes:

- When a change is made to the timing of a published event, the Sourcing Agent should update IPS accordingly. Please refer to P&C's guidance for specific instructions.
- If the new date selected is less than five days from the current date, a warning message will appear to notify the user. No action is needed to override the message.

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Contract Length: Months

Response Deadline: * 9 Apr 2021 11:59 PM EST

Award Date: 11:59 PM EST

Description: *

The Response Deadline you selected is less than five days from now. Are you sure you want to publish your posting for less than five days?

Clicking 'Update on Ariba Discovery' will finalize the changes. If the new date selected is within 5 days of the current day, a warning message will display, but the user does not need to take any action.

* Indicates a required field

Discard Changes Update on Ariba Discovery

IX. Reviewing Responses and Requesting Clarification or a BAFO

When the Event reaches the response due date, the event status becomes '**Pending Selection.**' At this point the user can open the '**Envelope**' to review the responses.

1. When the bidding is closed, the Event will go to a '**Pending Selection**' status. At that time, the user can click the '**Actions**' button in the top right (obscured by the popup menu in the image below) and select '**Open Envelope**' to begin to review the bids.

Doc292197227 - Example Sourcing Event

Overview Content Supp Scena

Overview

ID: Doc292197227

Description: Services Event Example

Status: Pending Selection

Version: v1

When the Event goes to 'Pending Selection' status, the user can select 'Open Envelope' from the 'Actions' dropdown menu on any Event tab to begin reviewing the vendor responses.

Close Event
Cancel Event
View As Participant
NC Test Vendor (State Supplier)
Mari Test Account 1 (Mari 1)
Document
Edit
Open Envelope

2. The '**Open Envelope Confirmation**' page will display a list of the participating vendors. Click '**Open Envelope**' to compare the responses.

Open Envelope Confirmation

You are about to open envelope 1 of 1 in this event.

Selected Participants Review Envelope Content

Selected Participants

Organization Name Contact Name Invited Sourced Locked Status

Mari Test Account 1 ✓

NC Test Vendor ✓

SourcingTrainer10 No Yes No Participated

Click the 'Open Envelope' button to see the concealed responses for all vendors who responded.

Open Envelope Cancel

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3. Navigate to the **'Content'** tab if not already there and scroll down to see the responses revealed to the right of Sections 4 through 6. The vendor's name will display at the top of the column, and if there are several responses, the user will have to keep scrolling to the right to see them all.

On the **'Content'** tab, the envelope icons are all open, and the vendor responses are now visible to the right of the subsections. Note the vendor's names at the top of the column. Only two sets of responses are visible here, but scrolling to the right would show other vendor responses, and scrolling down will reveal more returned attachments.

4. If the user manually set up the Event to contain multiple envelopes and had opened and reviewed the contents of **'Envelope 1'**, they would click on the **'Actions'** button again and select **'Choose suppliers for next envelope'** from the dropdown menu.

Click the **'Actions'** button and select **'Choose suppliers for next envelope'** from the dropdown.

5. The **'Choose suppliers for next envelope'** page will display, and users can select for which vendors they'd like to see pricing information. It can be for all vendors, or they can choose to exclude certain vendors if the information they saw in **'Envelope 1'** excluded them from moving on in the process. Check the boxes next to the vendors of interest and click the **'Unseal Next Envelope'** button.

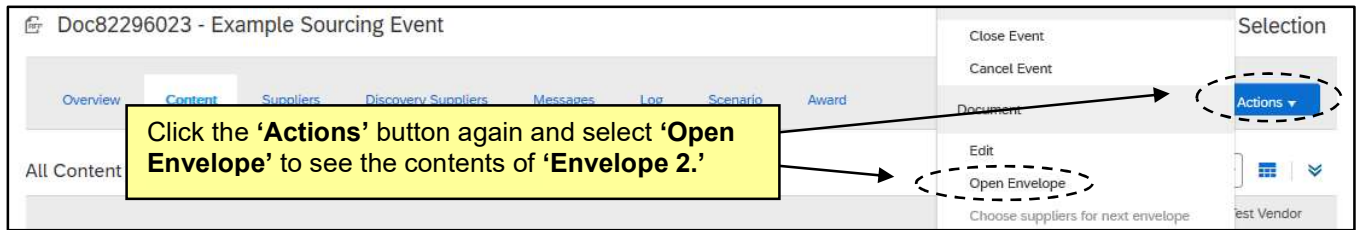
Select the vendors for which to see the contents of **'Envelope 2'** by checking the box next to their name (in this example only one vendor has been selected, but in most situations, multiple vendors will be chosen) and click **'Unseal Next Envelope.'**

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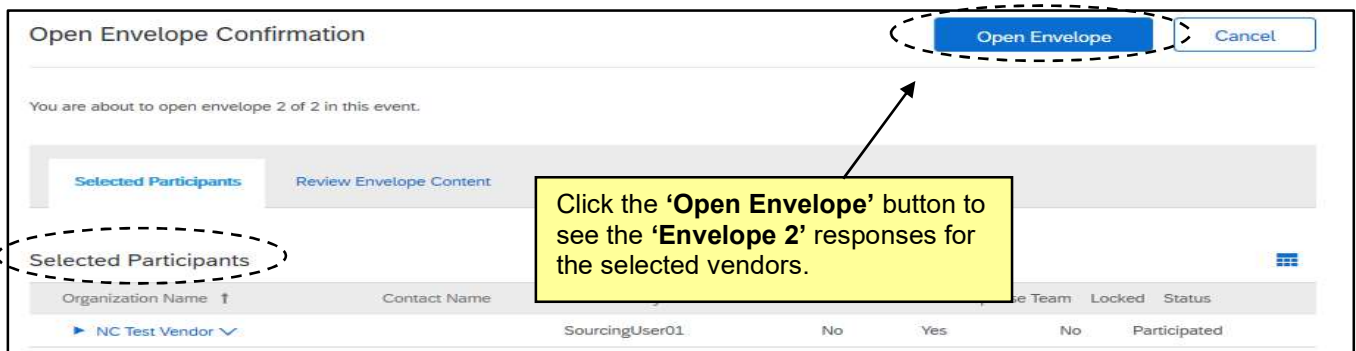
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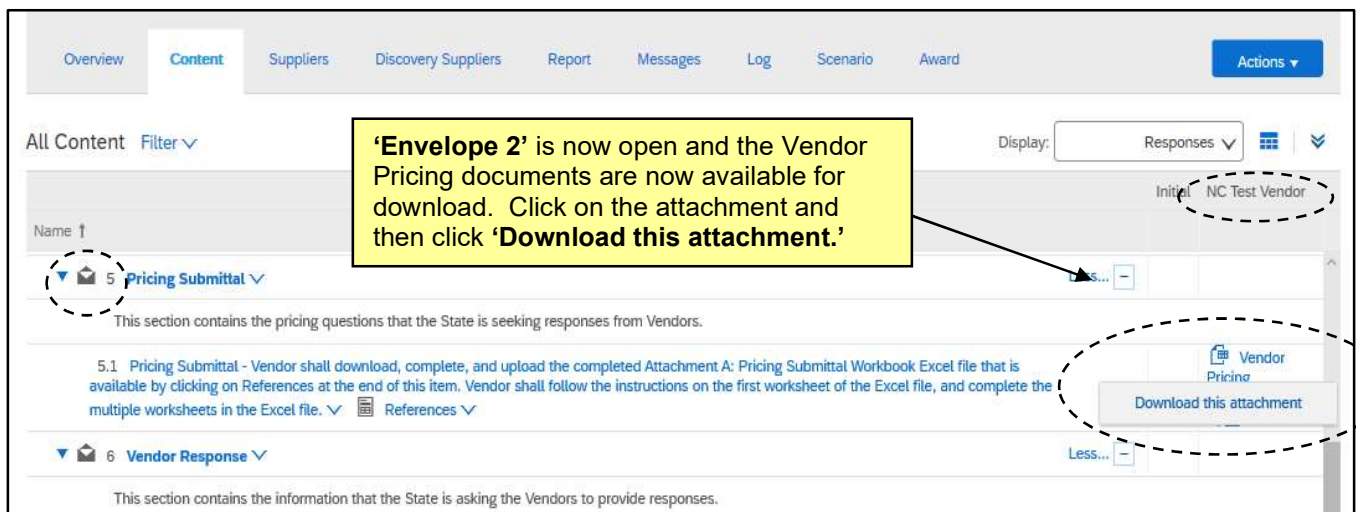
- On the **'Content'** tab, click the **'Actions'** button and select **'Open Envelope'** from the dropdown menu.



- The **'Open Envelope Confirmation'** page will display listing all participating vendors. Click **'Open Envelope'** to compare the responses for the pricing information contained in **'Envelope 2.'**



- On the **'Content'** tab, **'Envelope 2'** in Section 5 (for this example) is now open. On the right side the user will now see the Pricing Response documents the vendors uploaded that were previously concealed. Click on the attachment and select **'Download this attachment'** from the popup to download and review the pricing submittals.



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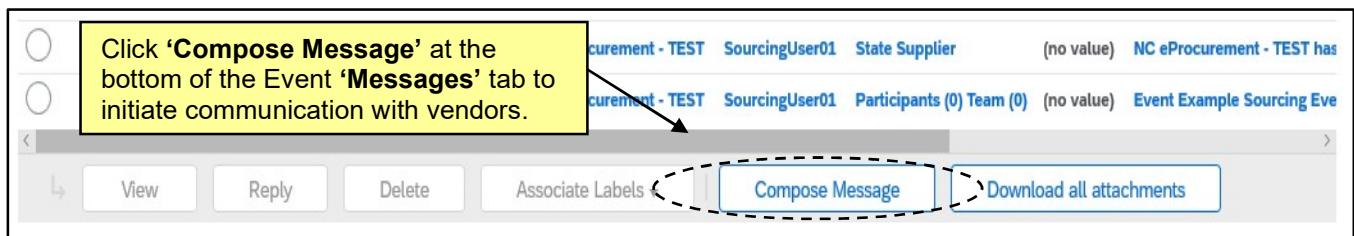
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- Before fully reviewing and evaluating all responses against each other, take the information gathered and **'Post Preliminary Bid Tabulation to IPS'** per the **'Tasks'** tab.

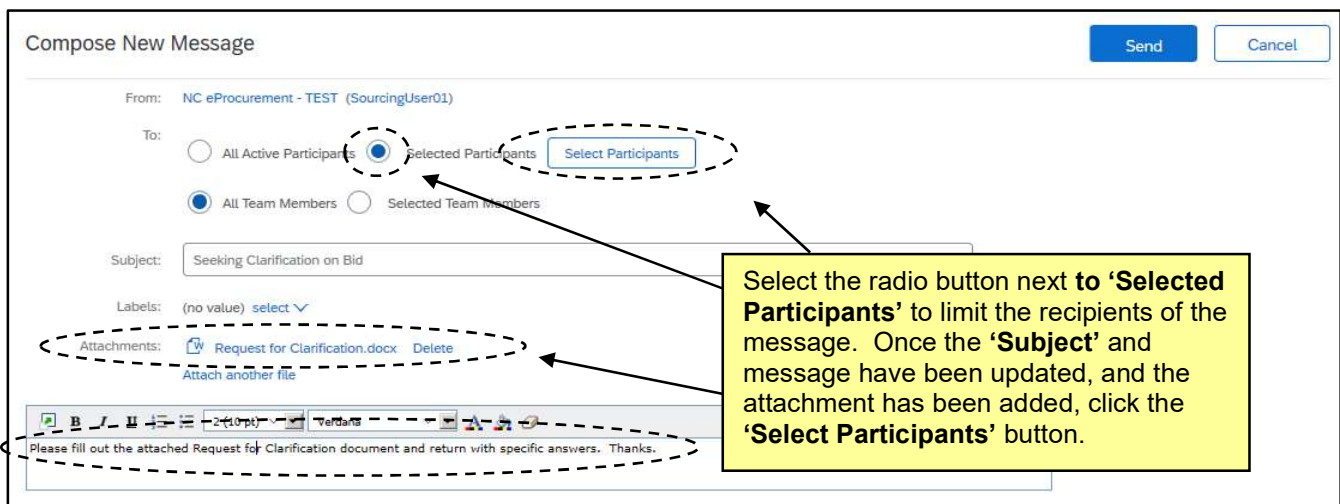
Notes:

- There is an option in the **'Actions'** dropdown menu to **'Download All Supplier Attachments'** where users can mass-select vendors and sections and download everything all at once.
- The **'Report'** tab on the Event has a button called **'Download Reports.'** Selecting **'Question and Terms Report'** may help in providing all vendor response information in Excel format. If users included **'Line Items'** in the Event **'Content,'** the **'Bid Comparison Report'** option provides a helpful Excel export of that information.
- A **'Preliminary Bid Tabulation Template'** can be found in the **'Sourcing Project Documents'** folder on the **'Documents'** tab should the user desire such guidance, but it is not required to use this form.

- While reviewing the vendor responses, it may be necessary to seek clarification with certain vendors or request a BAFO. This communication will be made through the Event message board. Navigate to the Event **'Messages'** tab and click the **'Compose Message'** button at the bottom of the screen.



- On the **'Compose New Message'** page, select the recipients of the message. Unlike adding an **'Addendum'** where the audience is everyone, in a situation where the user is seeking clarification or a BAFO, the message will likely be directed to a smaller group of participants, if not just one. Click the radio button next to **'Selected Participants,'** enter a more specific **'Subject,'** and write an informative message in the body. Attach a **'Request for Clarification'** form (the template for which can be found in the **'Sourcing Project Documents'** folder on the **'Documents'** tab of the Project). Then click **'Select Participants'** to narrow down the recipient group.

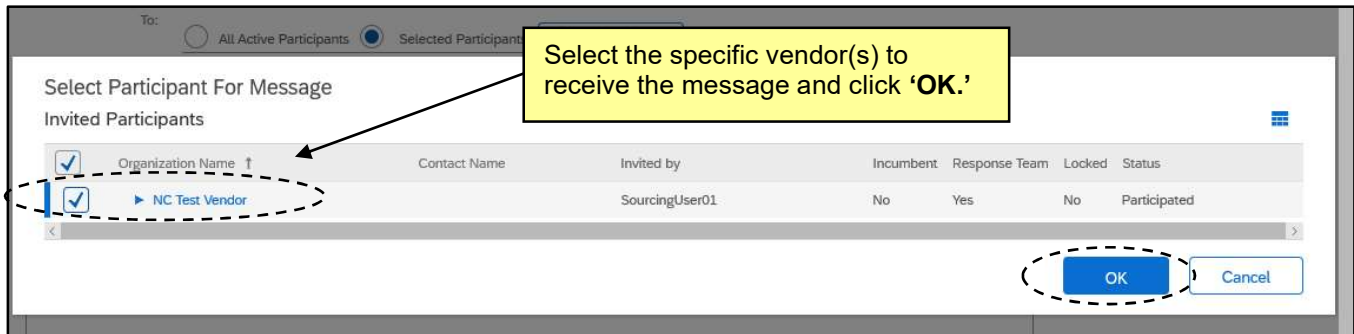


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- The **'Select Participant For Message'** popup will display, and the user can select to which vendor(s) the message should be sent; next, the user can click **'OK,'** and then click **'Send'** back on the **'Compose New Message'** page. The new message will display on the **'Messages'** tab, and the user will wait for a response from the selected vendor before making any more decisions.

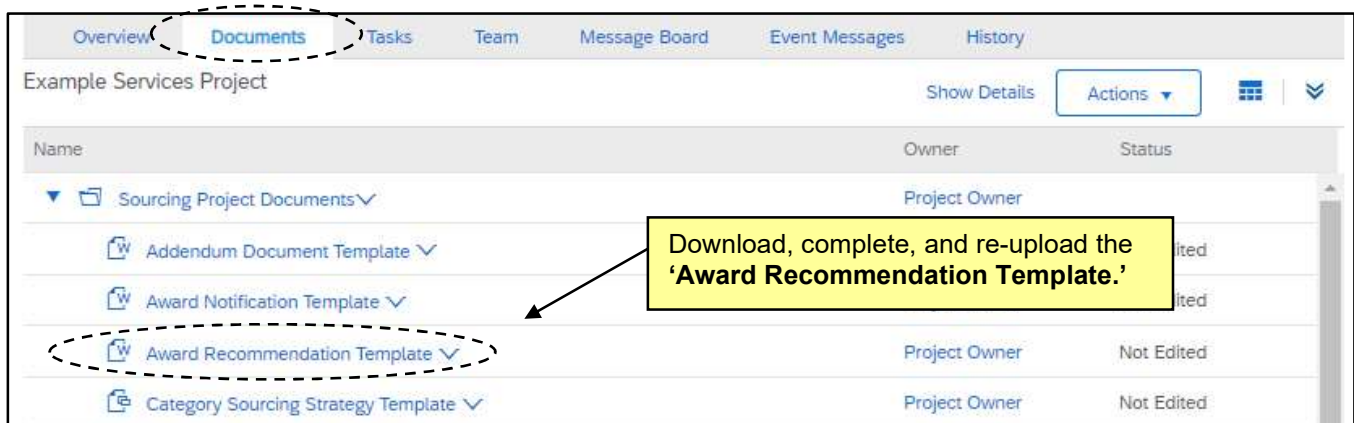


- If the user needs to request a BAFO from a specific vendor, the request will begin with a targeted message as demonstrated above, but the user should attach a **'Request for BAFO'** form instead of a **'Request for Clarification'** form.

X. Awarding the Solicitation

After all information has been received and considered, the user can develop an **'Award Recommendation'** and post the final Bid Tabulation and Award Notification on IPS. The Event has **'Scenario'** and **'Award'** tabs on it, but those are not used at this time. All decisions will be made offline with the information gathered in the Event, with the assistance of the **'Award Recommendation'** and **'Award Notification'** templates if needed, both of which can be found on the **'Documents'** tab of the Project.

- Once all the information has been gathered from the Event and all input has been considered, the user can go to the **'Documents'** tab on the Project and download the **'Award Recommendation Template'** from the **'Sourcing Project Documents'** folder. It should be completed with information about the winning bid and re-uploaded onto the **'Documents'** tab for historical purposes. If the recommendation needs approval, this document is attached to a task on the **'Tasks'** tab and can be routed accordingly.



- Once the award determination has been finalized, download and complete **'Award Notification Template'** document, along with the **'Final Bid Tabulation Template'** (both can be found in the **'Sourcing Project Documents'** folder on the **'Documents'** tab) and post both documents in IPS per guidance from P&C.

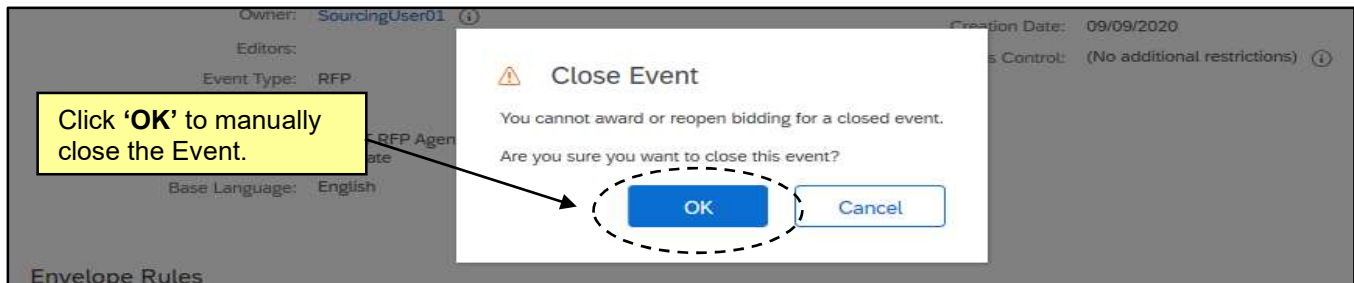
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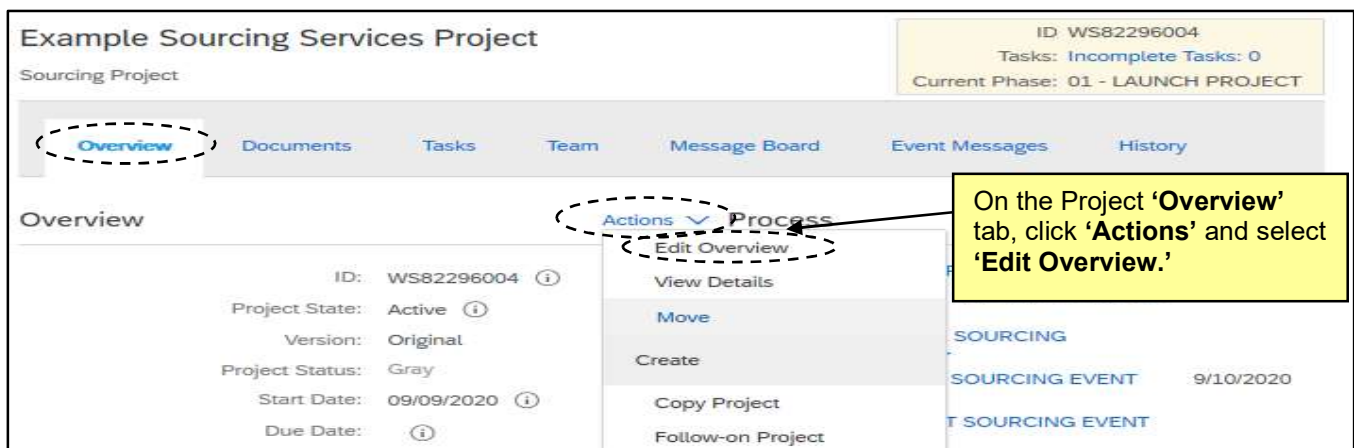
- Now that solicitation has been awarded, return to the Event to close it. Even though an award has been issued, the status will still read **'Pending Selection'** because the award was determined outside of the Event. To manually close the Event, click the **'Actions'** button in the top right and select **'Close Event.'**



- The **'Close Event'** warning will display reminding the user that **'Closed'** Events cannot be reopened, which is okay because they can still be accessed for important historical information. Click **'OK.'**



- The Event status will update to **'Completed.'** Now navigate back to the **'Overview'** tab of the Project to mark that as **'Completed,'** too. Click **'Actions'** at the top of the **'Overview'** tab and select **'Edit Overview'** from the dropdown menu.



-
- Edit Example Sourcing Services Project** OK Cancel
- Make necessary changes to the general attributes for this project by editing the necessary fields on the **Overview** tab. On the **Template** [More](#)
- Overview** Template Questions
- Name: * ⓘ
- Project State: Active ▼ ⓘ
- Version: Active
- Start Date:
- Project Status: Planned
- On Hold
- Cancelled
- Description: Completed
- Click the dropdown arrow next to 'Project State' and select 'Completed.'**

-
- The screenshot displays the SAP S/4HANA Sourcing Project page. The 'SOURCING' tab is selected. The 'My Documents' table shows two entries: 'Example Sourcing Event' and 'Example Sourcing Services Project', both with a status of 'Completed'. A yellow callout box points to the 'Completed' status of the 'Example Sourcing Event' entry, stating: 'Both the 'Sourcing Project' and 'Sourcing Event' display as 'Completed' in the user's 'My Documents' portlet.'